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ABSTRACT

This paper examines the changing role--and important conceptions of leadership for that role--espoused by headteachers in British primary schools during a period of significant reform. It illustrates the interplay between structural effects on roles and emerging leadership perspectives found in the theoretical literature and develops a conceptual framework from contrasting leadership theories. It highlights critical, postmodern, and poststructural conceptions of leadership. These constructions are then used to examine the developing problems and opportunities for this category of leadership as understood and expressed by practitioners. The research reported here drew on data from a 6-year qualitative study of a stable cohort of four primary headteachers in Oxfordshire, England. The report places the study in national and international reform contexts and briefly notes the unique characteristics of educational reform in England and Wales. The second major section presents the conceptual framework that guided the study development and analysis phases. This section also highlights the longitudinal study presented in the report. The third section reviews research strategies and rationale, and the fourth section presents findings from the final phase of the study. The data reveal a transition in leadership over a six year period characterized by a more instructional leadership among head teachers. (Contains 55 references.) (RJM)

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Manifestations of Critical Leadership in Tides of Reform: Contradiction or Opportunity?

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Paper presented at the annual meeting of the
University Council for Educational Administration
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Introduction

"I Quit, Head Told Minister" (Johnstone, 1998). So began an article in the London Times in October 1998. The article proceeds to describe how a headteacher in a British primary school announced his resignation in disgust during a public reception celebrating the school's academic turnaround. The headteacher was quoted as saying that, "He could no longer stomach the harshness of inspections, government interference and the 'climate of blame' that he said was driving many good heads out of the profession" (Johnstone, 1998).

What lies behind this growing sentiment among seemingly effective school leaders? For the last eleven years, primary and secondary schools in England and Wales[i] have experienced vast change in virtually all aspects of the education program and management of their schools. Curriculum, pedagogy, and governance have each been shaped by the sweep of education reform under both Conservative and Labour governments, three Prime Ministers, and a range of education ministers. The impact of standards-based, market-driven educational reform policy has created a unique impact on those who lead schools in England and Wales.

Purpose of This Paper

This paper examines the changing role, and important conceptions of leadership for that role, espoused by headteachers in British primary schools during this period of significant reform. In addition, through the lens of "critical leadership" I illustrate the interplay between structural effects on role and emerging leadership perspectives found in the theoretical literature. The paper develops a conceptual framework from contrasting leadership theories and highlights critical, postmodern, and post-structural conceptions of leadership, which is then used to examine the developing problems and opportunities for this category of leadership as understood and expressed by practitioners.

The research reported here represents data from a portion of a six-year qualitative study of a stable cohort of four primary headteachers in Oxfordshire. Although British in context, the findings suggest commonalities outweigh the differences and, therefore, lend currency to an American audience as well as an international one. The role of the British headteacher and the American elementary principal are very similar with the greatest differences found in initial preparation rather than execution of the role in schools.

This paper first places the study in national and international reform contexts and briefly notes the unique characteristics of educational reform in England and Wales. The second major section presents the conceptual framework that guided the study development and analysis phases. In addition, the second section highlights the portion of this longitudinal study reported in this paper. Section three reviews the research strategies and rationale. The fourth section presents findings from the final phase of this study and is followed by a discussion of those findings and importance in the final section.

School Leadership and the "Flood" of Reform

A great deal has been written about the impact of educational reform on the role of headteachers in British schools (e.g. Grace, 1993; Hall & Southworth, 1997; Walford, 1993; Webb & Vulliamy, 1996a). An essential finding from many of these studies describes a shift toward broadly managerial concerns from the traditional instructional leadership of headteachers (Raab, et al, 1997, Webb & Vulliamy, 1996b). This "flood tide" of managerialism has become the defining challenge for British headteachers (Bolam & Dunning, 1996) and also for school principals in other countries as well (Portin, 1998; Williams, Harold, Robertson, & Southworth, 1997).

School leaders in many countries find their leadership role has been hemmed-in by a host of managerial responsibilities that, heretofore, had been assumed by some central authority. The rush to move decision-making authority to schools, at least on the rhetorical basis of local control, has meant that school leaders have far more responsibility than they have had in years past. These school leaders find greater decision-making degrees of freedom (in some areas), and must draw upon an enlarged set of skills that they may, or may not, have been prepared for (e.g., large-scale budgeting, owner representation for building works, contract negotiations). One of the central roles that cannot be ignored is the headteacher's role as implementer and interpreter of governmental reform policy. Curricular, pedagogical, and structural reforms all fall under the responsibility of the headteacher to assure that they are understood and implemented.

The flood of market-driven reform, high-stakes accountability measures, ever tighter defining of curriculum and pedagogy, and the broad participation of a host of new players are common themes in many countries. Grant-maintained schools in England and Wales find their echoes in the American charter school movement. The British National Curriculum and

associated assessments raise a number of issues similar to those engendered by the American efforts to legislate academic learning requirements, raise "the bar" of higher expectations, and hold teachers accountable for the performance of their students on academic tests. Indeed, in both the US and UK, proposals to link teacher pay to student outcome measures (as in performance-related pay proposals in the UK) are gaining ground.

The UK and US are not alone in this flood of educational reform. Similar measures are being tried in other countries such as New Zealand and some of the Scandinavian countries. Undergirded by conservative politics, schools are being swept along in the permeability of our global information society along with a common national angst for international economic competitiveness.

Central Features of This Study

Some researchers indicate that the changes occurring in leaders' roles are such that more robust definitions of transformational leadership are hard to describe, much less to find in action (Southworth, 1999). At the same time, leadership research continues to represent all manner of leadership forms: from the traditional managerial (concerned for the efficient operation and provision of the school), to the transformational (concerned for community-building, strategic direction setting, and shared leadership), to the emerging critical views (concerned with empowerment, social critique, and reflection).

This parallel development of complex leadership theory and the empirical realities of changing leadership roles invite the question: Are critical and transformational leadership a possible outcome of market-based reform? Or, is critical and transformative leadership completely overwhelmed by the "structural" components of the educational reform environment? Or, has educational reform acted as a "seed-bed" for critique of educational policy and therefore presented itself as a platform for "agency," for critically reflective action by practitioners questioning the outcome of educational reform?

The purpose of this paper is to begin to explore these questions. At the same time, I take up the challenge of discussing what I mean by "critical leadership" and how it develops from a complex understanding of leadership. Furthermore, grounded in a longitudinal study of four headteachers in England, I propose to examine their developing conceptions of leadership for the purpose of revealing the critical notions therein.

Theoretical Framework

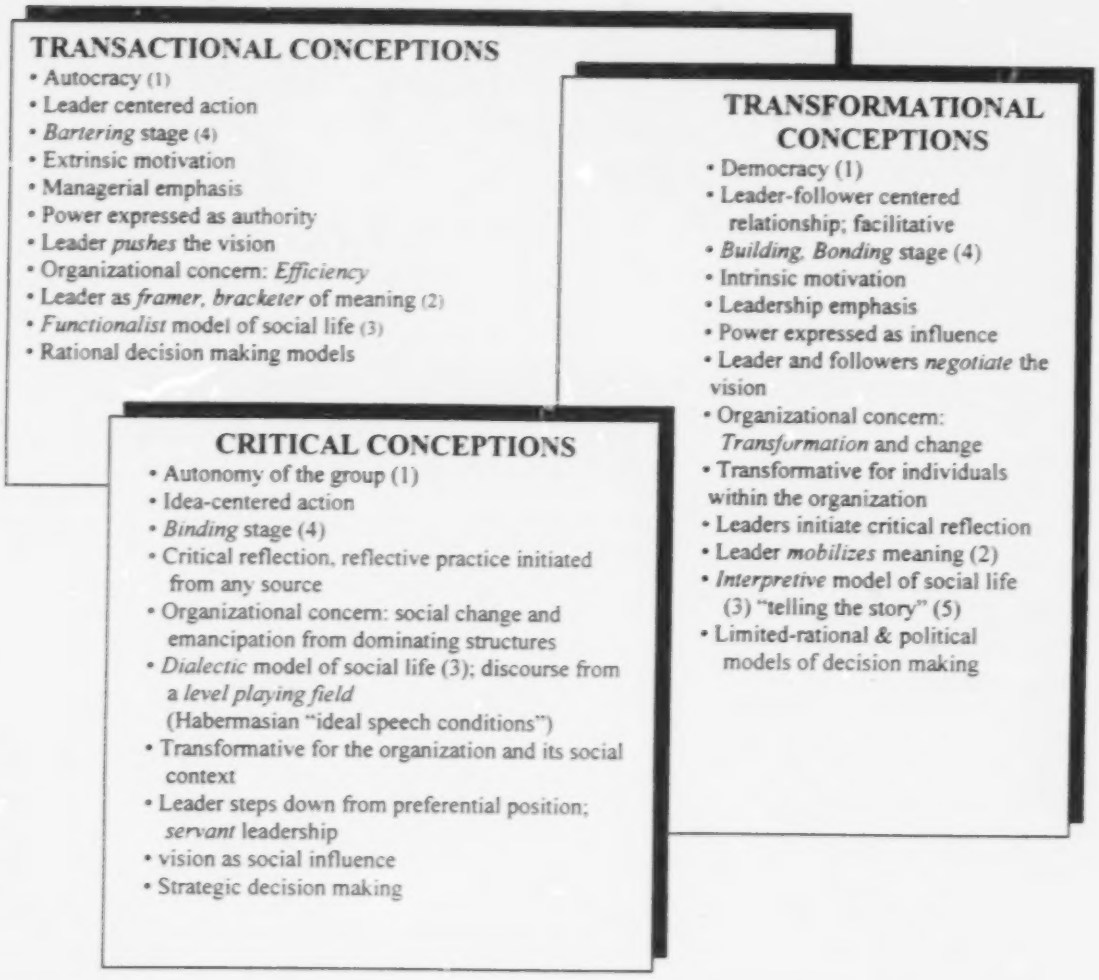
In a provocative article, British academic Geoff Southworth (1999) questioned the feasibility of transformational leadership in a time of externally imposed reform. One aspect of UK educational reform is that headteachers are being called upon to exercise more direct leadership, in essence consolidating positional power in the role of headteacher. Southworth's question of whether headship was "transforming" or simply "being transformed" is an astute one. It is a question that reveals an important challenge for school leaders during this particular period of reform. Their challenge is to walk the narrow line of power consolidation in positional leadership at a time when the stakes are so high from school accountability measures. How do school leaders empower others when the risk of their failure may have grave consequences in a school inspection" or in the annual perceptions of school effectiveness prompted by the public reporting of achievement testing? This is a challenge that requires researchers in leadership to consider multiple understandings of what leadership is and could be.

Three Conceptualizations of Leadership Understanding

Three conceptualizations of leadership that I bring to bear on my inquiry, illustrated in Figure 1, bear on my inquiry. Within the literature on school leadership, there is a rich array of conceptualizations, categories, and perspectives, which have evolved across five decades of leadership theory development. All these conceptualizations can be helpful if they are examined for the underlying assumptions, particularly those related to power and position, and as long as they push our thinking toward complex understanding of leadership beyond a simple exercise of positional authority. To help illustrate these broad conceptualizations of leadership, I have drawn upon four works: Ribbins (1985); Smircich and Morgan (1982); Sergiovanni (1995), and Winkley (1983). These four works represent only the tip of the theoretical iceberg, but each presents conceptualizations, metaphors, and categorizations that are useful as a theoretical framework for this study.

In presenting these three conceptualizations, I recognize the common problem of drawing analytical distinctions between that which is necessarily interrelated. Certainly within the daily life of school leaders there are few times when they are operating solely within any single frame. Instead, the practice of leadership is to move in and out of these conceptualizations and blend them according to the situation at hand. It is a bit like the distinction between "management" and

Figure 1: Three Conceptions of Leadership


TRANSACTIONAL CONCEPTIONS
• Autocracy (1)
• Leader centered action
• Bartering stage (4)
• Extrinsic motivation
• Managerial emphasis
• Power expressed as authority
• Leader pushes the vision
• Organizational concern: Efficiency
• Leader as framer, bracketer of meaning (2)
• Functionalist model of social life (3)
• Rational decision making models
TRANSFORMATIONAL CONCEPTIONS
• Democracy (1)
• Leader-follower centered relationship; facilitative
• Building, Bonding stage (4)
• Intrinsic motivation
• Leadership emphasis
• Power expressed as influence
• Leader and followers negotiate the vision
• Organizational concern: Transformation and change
• Transformative for individuals within the organization
• Leaders initiate critical reflection
• Leader mobilizes meaning (2)
• Interpretive model of social life (3) "telling the story" (5)
• Limited-rational & political models of decision making
CRITICAL CONCEPTIONS
• Autonomy of the group (1)
• Idea-centered action
• Binding stage (4)
• Critical reflection, reflective practice initiated from any source
• Organizational concern: social change and emancipation from dominating structures
• Dialectic model of social life (3); discourse from a level playing field (Habermasian "ideal speech conditions")
• Transformative for the organization and its social context
• Leader steps down from preferential position; servant leadership
• vision as social influence
• Strategic decision making

Informing Sources:
(3) Ribbins, P. (1985). Organisation theory and the study of educational institutions. In M. Hughes, P. Ribbins, H. Thomas (Eds.), Managing education: The system and the institution (223-261). London: Holt, Rinehart & Winston.
(2) Smircich, L., & Morgan, G. (1982). Leadership: The management of meaning. Journal of Applied Behavioral Science, 18(3), 257-273.
(4) Sergiovanni, T. J. (1995). The principalship: A reflective practice perspective (3rd Ed.). Boston: Allyn & Bacon
(1) Winkley, D. (1983). An analytic view of primary school leadership. School organisation, 3(1), 15-26.

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"leadership", it is not an "either/or" proposition, it is "and/both"–both are required. Within the world of school leadership, I suggest that all three of these conceptualizations are present and important. It is reflective self-understanding and attention to the moral and ethical imperatives of leadership that keep it grounded in appropriate exercise.

Transactional conceptions.

The first category of leadership which I term broadly as "transactional conceptions" originates from the language used by Burns (1978), and serves to illustrate a centering of leadership on the action and positional authority of the leader. The frame of reference, locus of control, and description of social interaction is leader-centered. In addition, this conceptualization finds root in structuralist conceptions of organizational life, rational models of decision making, and efficiency concerns for organizational output.

This leadership conceptualization does not ignore the moral and ethical responsibilities of positional leaders. Leaders expressing this type of positional power must be highly attentive to the dominating aspects of their autocracy. Sometimes referred to as the "benevolent autocrat", this conceptualization of leadership finds expression in heroic and charismatic conceptions of leadership. These are the leaders who can often produce "results" in short order through sheer managerial expertise or force of personality. In terms of the moral aims of the organization, the school in this case, much of this remains tacit and hidden by the powerful messages of these forceful leaders.

Transformational conceptions.

Again, starting with Burns' notion of transformational leadership, this conceptualization moves the idea of "power over" to one of "power with". As Burns states, "Power bases are linked not as counterweights but as mutual support for a common purpose" (1978, p. 20). Clearly, transformational conceptions of educational leadership have dominated the literature over the last two decades. Countless texts for preservice school administrators present this as a preferred model of leadership that helps to weave school leadership with developing a commonly held aim of what the stakeholders of the school community believe to be their *raison d'être*. In North American literature, Sergiovanni (e.g. 1990; 1991; 1994; 1995) and Leithwood and colleagues (Leithwood & Jantzi, 1990; Leithwood, 1993; Leithwood, Begley, & Cousins, 1994)

have been significant influences on how we understand transformational leadership for school principals. Transformational conceptualizations are equally evident in UK literature as well (e.g. Grace, 1993; Mortimore & Mortimore, 1991).

The central features of this conceptualization help us to describe and understand how democratic action works in school decision making, how principals and headteachers share leadership and develop leadership in others, and how ideas, aims, and hopes become the central defining characteristics of a school's mission or vision. Principals and headteachers do not abdicate their positional responsibility for the management of the school; rather, they may share it, but continue to use their positional authority to bring the resources of the school to bear on mutually agreed ends while at the same time empowering others to exercise significant influence in the school.

Critical conceptions.

A third conceptualization of leadership, broadly conceived as "critical leadership," are most directly found in the work of Smyth (1989; 1993) and Foster (1986; 1989). These perspectives trace philosophical roots to the critical theory of the "Frankfurt school" and Jürgen Habermas–some foundational ideas being the rejection of positivism, the embrace of interpretivism, emancipatory ends, and clear links to practice. Additional links may be found in the tradition of reflective practice and action research (Carr & Kemmis, 1986).

The idea of reflection for the purpose of responding to conditions that allow or promote domination (in the form of bureaucracy, structuralism, and organizational power) moves this action from mere reflection for the purpose of organizational or professional improvement to one of social critique. As Carr and Kemmis note,

> In the hurly-burly of life in schools, teachers must use their practical judgment in decisions about these matters. But each can be reflected upon and reconsidered (made problematic) to inform future practical judgments, and each can be seen in social and historical context as facilitating or debilitating progress towards a more rational and just society (p. 39).

What might those forms of social condition be which critical perspectives rise to challenge? Perhaps most written about, from a school management perspective, is the domination of marketization as a social condition and means of educational reform (Grace, 1993; Ranson, 1993; Smyth, 1993; West, 1994).

Critical conceptions of leadership are probably the most slippery to pin down but there do seem to be a number of themes that distinguish this perspective from the transactional and transformational. First is the role of facilitation. Bottery notes,

> The role of leadership is also concerned with one person enabling others to lead in order to harness all the elements of a fair and just society. In this respect, rather than being dominant, charismatic figures, heads or principals become facilitators, who are… "responsible to a process rather than specific outcomes, to the integrity of the community rather than to the needs of particular individuals [Barber, 1984, p. 280]". (Bottery, 1992, pp. 181-182)

This type of facilitative leadership is concerned with social change, not control (Foster, 1989). Or, as Giddens notes, "As critical theory, sociology does not take the social world as a given, but poses the questions: what types of social change are feasible and desirable, and how should we strive to achieve them?" (Giddens, 1982, p. 166).

The transformational leader also pays attention to facilitation, but the critical leader stirs, enables, and leads in the direction of what Codd calls, "active, properly informed social critique" (1989, p. 176). The aim of this facilitative leadership, ultimately, is to promote democracy, ensure an environment where free communication (similar to Habermasian "ideal speech conditions) can occur. Or, as Foster asserts, to "make problematic 'the way things are'" (1986, pp. 19), to "demystify" the way that structuralism constrains human agency.

Agency of the perspective.

Why pay attention to this perspective? What particular questions and problems of practice does this address? There are three immediately rise to the surface. The first is the idea of "voice" in leadership. By voice, I imply a sense of agency in position, of using the public platform of positional leadership from which to question the tacit assumptions of school practice and school reform. In the UK context, this type of voice in leadership is expressed in a range of settings from the forums (as revealed in the news item cited at the beginning of this paper) to the daily platform of school life, through interaction with governors, parents, and other interested stakeholders. The point is that leadership implies more than simply describing the school's programs and aims, it means articulating in a policy environment the preferred aims and goals of schooling. These are essentially normative actions.

The second problem of practice is the manner in which headteachers make sense of their complex social contexts. The complexity of this meta-sensemaking includes being able to articulate the links between policy, theories of action, practice, a fluid societal environment for schools (e.g. shifting sociocconomic conditions, family structures) and to bring a deep understanding of teaching and learning to each of the above. This is not an easy task and is essential cognitive leadership (Inbar, 1995; Reitzug, 1994).

The third problem of practice, as Southworth (1995) notes in his case study work of primary headship, is that a tremendous amount of power continues to reside in and with headteachers in state-supported schools, perhaps more power than at any previous time in recent history. The consolidation of power in local control of schools can mask or limit human agency. The ethical exercise of leadership, of authoritative power, ensures that power becomes a capacity shared with the stakeholders of the school rather than a wedge to force the headteacher's singular vision of what the school should be and how teachers exercise their professional influence.

Critical conceptions of leadership offer an important and rich theoretical perspective from which to understand the conceptualizations of headteachers and the challenges that they face in the current reform environment.

A Review of This Longitudinal Study

This study represents six years of data collection in four primary schools in Oxfordshire, England. The study, initially designed in conjunction with my doctoral work at the University of Oxford (Portin, 1995), has since developed into a longitudinal examination of school leadership through the experience and perceptions of a stable cohort of four headteachers. This paper examines a portion of the voluminous data from six years of qualitative study. In addition, the study falls into three broad areas of developing focus, roughly chronological in development.

Phase 1: the domination of managerialism

The original study (Portin, 1995) examined the changing conceptions of leadership in three primary headteachers. The study included three case study headteachers and another headteacher who participated as a pilot study subject. In the subsequent longitudinal phase of the study, I incorporated data from the pilot study headteacher, increasing the cohort from three to four.

This study, occurring in the early 1990s, focused primarily on the way that the early educational reforms in England and Wales, primarily the Education Acts of 1988 and 1993, were affecting the role of headteachers and shaping their conceptions of leadership as a personal construct. Clearly, at that stage, the heads were largely overwhelmed by new managerial responsibilities brought on by Local Management of Schools. This included far greater managerial responsibility for the finance of the school and the implementation of the National Curriculum. In addition, the existing boards of governors in each school were empowered with far greater responsibility. In the end, this phase of the study illuminated the onerous nature of the "new managerialism" and the tensions that these headteachers felt toward what were their historic roles as instructional leaders and pedagogical exemplars in the school.

During this phase of case study I was able to collect extensive data on the headteachers' personal constructs (i.e. Kelly, 1955) that shaped their perception and understanding of their role in this time of transition. The repertory grid technique (Fransella & Bannister, 1977) was used for this purpose. I include this description in order to outline how this study has grounded itself in the perceptions and lived experience of these four headteachers over the last six years.

In summary, then, this first phase of the study underscored the dominance of managerialism and the tension that headteachers felt between their new responsibilities and how they had historically conceived of their role as instructional leaders.

Phase 2: The re-emergence of instructional leadership

Following the completion of the first phase of this study, the opportunity arose, with the agreement of the case study headteachers, to continue the research relationship and follow the changes that occurred in their schools and role over the ensuing years. From 1995 the data collection moved to annual visits whereby the headteachers would allow for a half-day interview at their school site. In addition, I collected other documentary data, including the inspection reports for their respective schools. Data collection visits have occurred annually during the 1996-97, 1997-98, and 1998-99 school years.

From subsequent visits in 1996 and 1998, it became clear that a shift was occurring in the way this cohort of headteachers was conceiving of their role. At this stage, the onerous nature of managerialism while not eliminated, it was reported as being tamed (Portin, 1997; 1998a; 1998b; 1999). Through a combination of equipping their governors and members of staff for managerial

expertise, and the shaping nature of upcoming school inspections, these headteachers reported a re-emergence of their instructional leadership role. More of their time was spent looking at the schools' instructional program and, in all cases, resuming some regularly scheduled instructional presence in the school. They had moved from being overwhelmed by managerialism to being an active instructional agent driven, in part, by inspection preparations.

Phase 3: Institutional self-confidence and new opportunities

This paper turns attention to a third phase, based primarily on data collected in the spring of 1999. Managerialism is still a regular presence, but the four headteachers continue to utilize the developed expertise of others to help meet managerial needs. Their schools have completed comprehensive inspections and are now in a post-inspection phase. In all cases, their inspections were positive, but all have developed action plans to deal with the weaknesses identified.

These heads have entered a new phase of their leadership; and it is to this phase that I now turn my attention.

Methods

There are a number of bases on which one begins to consider when selecting a particular research strategy. Yin (1989) suggests three: "(a) the type of research question posed; (b) the extent of control an investigator has over actual behavioral events, and; (c) the degree of focus on contemporary as opposed to historical event" (Yin, 1989, p. 16). Merriam (1988) identifies three nearly identical points for strategy consideration as, "The nature of the research questions.... The amount of control.... [And] the desired end product" (p. 9). Of the three, greatest emphasis is often placed on the first point, the research questions themselves. Yin (1989) is emphatic in his assertion of the dominant role of the research question in selecting a strategy. "The first and *most important* [italics added] condition for differentiating among the various research strategies is to identify the type of research questions being asked" (p. 19). Yin presents five basic research strategies and the criteria for their uses in Table 1.

Table 1: "Relevant Situations for Different Research Strategies"

Strategy	*Form of Research Question*	*Requires Control Over Behavioral Events?*	*Focuses on Contemporary Events?*
Experiment	how, why	yes	yes
Survey	who, what, * where, how many, how much	no	yes
Archival analysis (e.g., economic study)	who, what, * where, how many, how much	no	yes/no
History	how, why	no	no
Case Study	how, why	no	yes

* "What" questions, when as a part of an exploratory study, pertain to all five strategies?

Table from, Yin, R. L. (1989, p. 17).

I chose case study as the most appropriate set of strategies for this study based, in part, by the dominance of 'how' and 'why' research questions. Additionally, this study does not require "control over behavioral events" and retains a "contemporary focus".

Selection of the Case Study Participants

All of this research was conducted in a single education authority in Oxfordshire, England. As an overseas researcher, my initial task was to familiarize myself with the British educational system, the role of headteachers, and the provisions of legislated educational reform. The next step involved selection of the case study participants. After extensive study, key informants at the university, local education authority (LEA), and educational policy level provided a list of headteachers recommended as being "effective". The recommendations were based upon on such characteristics as innovativeness, effectiveness in staff leadership, reflective style, positive regard with peers, and involvement in development activities outside of their school. Where triangulation revealed common nomination, every effort was made to obtain an interview with that particular headteacher. These exploratory/construct-developing interviews

were conducted during September and November of 1993. A total of 11 headteachers agreed to meet for a one-hour preliminary interview. A further three headteachers were interviewed with the same intent in February and March of 1994.

From the exploratory interviews a profile of the headteachers who might provide the most information-rich cases emerged. The following characteristics were identified:

1. Headship of a large (greater than 250 student) primary school.

The number 250 was selected as being above the county average for primary schools. The reason for selecting headteachers of large primary schools was tied to the belief that headship in multiple staff primary schools requires a different set of skills and attributes than those needed in a small village primary. In the first case, headteachers in the large primaries do not maintain a timetabled teaching commitment. Their time is devoted almost solely to leadership and management of the school. Secondly, the communication issues, decision-making procedures, and staffing structure is much more complex in a large school with multiple staff. It is that aspect, as it relates to the exercise of leadership, which retained a central theme in the study.

2. A perception of "effective leadership" among colleagues.

The headteachers were purposefully selected as "manifesting the phenomenon of interest intensely (but not extremely)" (Patton, 1990, p. 171).

3. Experienced headteachers.

I sought experienced headteachers believing that headteachers (and teachers) concentrate on different issues at different stages of their careers (Nias, 1989; Oja & Pine, 1983, 1984; Oja, 1987; Sikes, 1985).

On the basis of these criteria, 7 of the 14 interviewed headteachers were approached with a request for their participation in the full study, three declined[iii], and seven were not approached owing to a failure to meet all three criteria listed above. I anticipated that the extended time commitment would be a limiting factor to participation and, indeed, that was the case. In the end, four agreed to participate. The first was selected as a pilot case study, and the remaining three scheduled subsequently as main study sites.

Research Strategies

The use of multiple methods, or methodological triangulation, was implemented in order to strengthen the construct validity of the study. The primary method of data collection was though semi-structured interviews with the headteachers. In addition, non-participant observation was used to place the actions of the headteachers in context and to confirm a match between espoused theory and theory-in-action.

In the initial study (1993-95), a sample of teachers were also interviewed and a questionnaire administered to all teaching staff. Furthermore, all sites provided free access to school documents including meeting minutes, school prospectuses, and school development plans. In addition, copies of each schools Ofsted inspection report has been included in document analysis of these triangulatory data.

Finally, the repertory grid technique was used to elicit the headteachers core personal constructs around the topic of leadership.

A note on the repertory grid technique and personal constructs.

For the purpose of this study, additional data were needed on how headteachers construe their role and interactions with staff; or as Cohen and Manion (1989) state, which constructs does he/she use to "evaluate the phenomena that constitute his world" (p. 337). The use of the repertory grid technique, as introduced by Kelly (1955) and further refined and explained by Bannister and Mair (1968), Bannister (1982) Fransella and Bannister (1977) and Hall (1978) has been an insightful portion of the study. A key question of this longitudinal study is how headteachers are shaped by their social interactions with other people, and how the personal constructs of headteachers shape their conceptions of leadership. The repertory grid technique represents one way to understand those perceptions. It is for this reason, and to add further validity to the analysis of observation and interview data, that I used this technique[iv].

Analytic Methods

The data collection strategies have included semi-structured interview, non-participant observation, and relevant document analysis. The interviews have been transcribed and content analyzed. A content analytic methodology was used in the final data analysis. Content analysis is "a multipurpose research method developed specifically for investigating a broad spectrum of

problems in which the content of communication serves as a basis of inference" (Holsti, 1968; [cited in Cohen & Manion, 1989, p. 60]). Patton (1990) sees content analysis as "the process of identifying, coding, and categorizing the primary patterns in the data" (p. 381).

The method is inductive, relying on the data themselves to *tell the story* rather than comparing the data to a hypothetical test. Although the early origins of content analytic application were to "quantify" communication data (Cohen & Manion, 1989, p. 61), the methodology itself has evolved to be much broader in its use. I view simple quantification as a questionable qualitative strategy in interpretive research.

The focus of content analysis, as in Glaser and Strauss's (1967) "grounded theory" approach, is to allow the data themselves to determine the shape and specifics of the analysis, to generate theory from the research process itself (Glaser & Strauss, 1967. p. 6). Although this research is not testing-out research, it is also not free of a framework of existing theory–hence, a "modified grounded theory" approach. The existing formal and substantive theory (Glaser & Strauss, 1967) helps to delimit the range of the study and raises questions that guide the data collection. I chose to *paint a picture* from a vantage point that is influenced by existing theory; this serves as a platform but is not the picture that is painted. In this way, the content analytic strategies of this study are viewed as a discourse between theoretical constructs and post-hoc category generation.

Findings

The following summaries represent interviews conducted on March 22-23, 1999 with the four primary school headteachers in Oxfordshire, England. These summaries are for this round of interviews only, but the discussion section will draw upon prior interviews reported in earlier papers and articles (Portin, 1995; 1997; 1998; 1999). The purpose is to contextualize the most recent interviews within the conceptual frame of this paper. The identities of the participants in this study are not revealed and will be referred to as Headteachers A through D.

Headteacher A

"I feel you can only be professional if you are self-determined."

Headteacher A reported on a number of changes in his role in the school. Particularly, he reported on the experience of teaching a full day each week in the prior year as a result of staff need. The experiences of teaching in this situation were reported as being positive in increasing his empathy for the role of teachers, but challenging for the overall load of school administration. The main policy issue in his area of concern was over the implementation of the "Literacy Hour[v]" and soon to be launched, "Numeracy Hour." Headteacher A reported that staff were generally appreciative of the Literacy Hour and that key senior staff had been crucial in its adoption and presentation. Asked about his role in the Literacy Hour provision, he saw his role as largely "facilitative", as in providing supply (substitute) teaching for teachers pursuing in-service training around the provision.

Asked what other items were large projects for the year, he reported that implementing a new appraisal scheme was also crucial, as well as updating the individual education plans (IEPs) of the special needs students and producing a home-school agreement outlining the roles and responsibilities of the school constituents. In addition to these aims, the head reported that they were building the instructional technology capacity of the school and looking ahead toward future targets for student achievement to be placed on the school by the Local Education Authority.

In terms of worries, Headteacher A reported that the linking of appraisal to government calls for "Performance Related Pay" was a central concern. He was not supportive of this initiative and saw it as potentially divisive. In addition, he was concerned about the setting of achievement targets for LEA schools and what that would mean at the school level.

As in earlier interviews, this head saw his role as largely facilitative and that was increasing even more. Although the school had a flat management structure and without an officially constituted "senior management team", the head indicated that they had moved to regularize that body to prevent miscommunication and misunderstandings.

In general, the activities that the head reported as central at this time were those associated with continual monitoring of the curriculum, reporting of school progress, and making sure that the school's policies were up-to-date and aligned with programmatic changes.

When asked what type of advice he would provide to new heads, Headteacher A indicated that he would "advocate patience" in this time of increased pressure on headteachers and class teachers. He also indicated that it was crucial for heads to "sit and think things through" lest they "drive down the wrong lane."

Headteacher A's main concerns were with government policy and the emphasis on examinations. As he stated, "Why don't they see that preparing for examination is not the same thing as education?" He saw simply placing high standards as "a myth" and that "looking after people" is what produced success.

Headteacher A continues to be involved in outside professional work, particularly around developing professional associations of educators. He is actively involved in promoting the normative dimensions of the school program and using data to illustrate success. In general, he indicated a pessimistic view toward the future largely termed as the "weight of responsibility" that is being placed on headteachers and class teachers.

Headteacher B

"Leadership is reflective thinking."

A number of similar themes were apparent in the replies to interview questions with other headteachers. Headteacher B also had reported a successful Ofsted inspection of the school, and the school has become a lighthouse school for their values education program. In addition, Headteacher B had been asked to assume headship of a school in another town that had an unplanned vacancy in the headship mid-year. The school, a challenging school in a low SES area, was proving to be a "testing ground" for this head to try out his ideas of change. The fact that he was able to run two schools simultaneously was an onerous task, but both schools appeared to be moving forward in their programs. The headteacher's home school has a well-developed team of senior teachers who are able to exercise a great deal of the instructional and program leadership for the school. Headteacher B indicated that he was convinced, however, that each school still required a headteacher presence, which placed a strain on him with two sites.

Headteacher B expressed criticism of the Literacy Hour initiative and the soon to be launched Numeracy Hour. His critique centered on the narrowing of educational aims that he saw expressed in these initiatives. As he stated, "the purpose of education is to civilize" and if standards were to be raised then teachers must be empowered in their professional role.

Headteacher B's school, as noted, is a school that has drawn attention in the press and with policy makers up to and including the head of the inspection service. Through its high profile, the school is reported to have many visitors who come to observe the school's program. The head indicated that he sees this as an opportunity use the "platform" of public visibility to advance his view of education. His central philosophy of education is person-centered and is founded on aspirations of human potential and well being. Values education and the "spiritual" health of the student and staff are expressed in interview replies.

Headteacher B's influence extends to a number of professional and scholarly bodies (national and international) that he belongs to. In addition, the education authority has utilized him for the interim headship and as a consultant on other countywide issues.

Although pessimistic about the direction of education reform, he indicated that he felt a growing degree of self-confidence in his role and with his ability to effect change in schools. As he stated, "change can occur quickly if everyone is pulling in the same direction."

Headteacher B has a number of international interests and has traveled and consulted overseas. In addition, he sees strategic advantage in his visible positions to argue the points of quality education that he believes.

Headteacher C

"We are beginning to feel confident to say that this is right for our children."

Headteacher C has been at his school the longest of any of the heads in this study. His school also had completed an Ofsted inspection from which they received a strongly positive report. The school is quite large for a primary school and serves children from a range of socioeconomic backgrounds.

It was clear in the interview that Headteacher C had taken a very careful look at the report from the inspection team and that the head and the senior management team of the school had used it to both bolster and guide their programmatic and professional development goals.

The head talks a great deal about data, using data, and data-driven decisions for the purpose of "monitoring and moderating the quality of teaching." In this school, the monitoring of teaching is by and large a peer process. The senior staff have all received training in peer observation and the appraisal process involves this direct participation of peers. The head and teaching staff have collected and disaggregated a wide range of student performance data. These data were used for further instructional planning and explaining the school's program and performance to external audiences.

Headteacher C indicated that the Literacy Hour has been appreciated by staff and used to good effect. He felt that much of this was due to the leadership of the senior teachers responsible for its implementation. He still maintained that it is too prescriptive and therefore anti-professional if used as set. He particularly feels that the structure of the Literacy Hour is not right for all children and that the teaching staff at an individual school need to be responsible for deciding what is best for the children in that school.

Headteacher C's advice to new heads is that they "sift" what is going on in the environment outside of the school, avoid "knee-jerk" reactions to new initiatives, and that as much as possible to customize the mandated reforms to the needs of the school. Like his colleagues, Headteacher C indicated that he is pessimistic about the future, particularly around headteacher supply. The pressures are driving many from the job and he was concerned with who some of the people might be that would take on headship.

His views have remained intently child-centered and data-driven. This headteacher has also been used by the local education authority for consultative purposes and had, in the past, also served in an interim headship in another school while simultaneously running his own.

Headteacher D

"Are we really achieving what we set out to achieve?
And are we getting to the goals we've set for ourselves?"

Headteacher D, as with Headteachers B & C, has been drawn from his school to act in consultative roles for the LEA. At the point of this interview (March 1999), he was on a full-time leave from his school to act as an advisory headteacher to other schools in the county. His brief included support to school in the implementation of the Literacy Hour. Headteacher D sees the

Literacy Hour initiative as "common sense", but feels the introduction was poor and "deprofessionalizing" to teachers. As he described his staff's initial experience with the materials he was quick to point out with examples how it is the headteacher's role to "frame meaning" for the Literacy Hour and to develop it alongside the perceived needs and values of the school.

Like his colleague, Headteacher C, this head reports at length the steps that the school has taken to gather and use data for decision making and understanding. One particular example he reported concerned gender differences at one grade level and the steps that the school had taken to discover what might lie behind those differences and whether they could be ameliorated.

Unlike his other two colleagues who had assumed extra-school responsibilities, Headteacher D established a "hands-off" approach to the school while on leave. He empowered the senior teachers to make decisions in his absence and he has over the years expressed high regard for and confidence in their decision-making abilities.

As with colleagues, Headteacher D has serious concerns about the direction of national education reform. He expressed suspicion and concern about the implementation of performance related pay schemes and the emphasis placed on test scores and their use in "league tables" comparing schools. He noted concerns that as the LEA reviews test score targets he "worries about the questions not being asked." Headteacher D has expressed consistent support for a broad-based curriculum that is developmentally appropriate and allows for freedom to explore and nurture curiosity.

When asked what advice he would give to new headteachers, he particularly noted that the head should pay particular attention to the role of the school governors (making sure they shared similar values) and the mentoring of teachers, particularly newly qualified teachers.

Headteacher D indicated that he has enjoyed his advisory role and will bring new perspectives back to his own school. He remains active in professional associations outside of the school and in his own professional development.

Discussion: "Swimming Across the Tide"

The data from this study reveal a transition in leadership understanding over the last six years. Much of this simply confirms what we know about the nature of changing school leadership roles in the 1990s. One strand of the analysis in this study indicates that while initially a shift to managerial understandings of leadership was predominant, recent data indicate at least

a partial shift to more instructional leadership on the part of these headteachers. As indicated earlier, these headteachers have moved forward through a time in the early 1990s when the managerialism of devolved authority and decision-making dominated their role. In the mid-nineties, the schools were actively engaged in the preparation for high-stakes inspections. In this phase, the headteachers appeared driven back to the instructional leadership role of their headship. Other factors were cited in this move toward the classroom including sometimes teaching more simply to save funds that would have been used for substitute teachers.

In addition, the headteachers have revealed a complex understanding of leadership as a term. Their discourse reveals that they think about leadership in a number of ways.

Using the Language of Critique

The language of critique has come more to the fore in the discourse and action of these school leaders. Part of this is due to what I term, "organizational self-confidence." Schools in England and Wales have been subject not only to the pressures of the market, but to rigorous inspection of their entire school program as well. These inspections are high-stakes, and the results can, in a sense, "make or break" a school (if not the headteacher). These schools have done well in this process and as a result seem to express a greater degree of self-confidence in both external critique and in internal direction setting. Leadership in this area is well beyond simple managerialism and suggests an emerging critical nature to their understanding and exercise of leadership. All four of the headteachers expressed similar lines of concern for the direction of such things as performance related pay, excessive pedagogical prescription (which deprofessionalizes teachers), to an emphasis on test scores for school comparison and its subsequent limitations on the breadth of the curriculum.

These headteachers are not reluctant to share their concerns, not only with colleagues, but also with government officials at the highest levels. In each of these cases they rely heavily on a clear understanding of the values and performance of their school and the values that underpin their educational philosophy. They appear to be engaging in critique from a point of credibility (successful schools) and a staff that is strong and cohesive.

Empowerment

Issues of empowerment are indicated in the nature of the relationship between the leader and the led. Shared leadership has always been a characteristic of the governance structure of these schools during the period of this study. However, the data from these schools indicate that leadership is being spread more broadly, beyond simple delegation of managerial responsibility to key staff with supplemental contractual arrangements to a broader delegation of the values of the school for greater participation and ownership by staff members.

Three of the headteachers have had periods of time away from their school to assume LEA responsibilities. In each case, they were able to rely on the teachers and governing body to carry the school forward. Consequential decisions are being made by teachers, particularly around the implementation of new schemes, such as the Literacy Hour. These headteachers retain a sense of the broad aims of the school, but delegate much of the active planning to the staff.

Reflective Leadership

Reflection has been an ongoing theme from each of the four headteachers. It is evident in their central personal constructs and appears to be a developing value as the years have progressed. In one sense it represents a tool used in staff supervision (e.g., in posing questions to individuals in such a way as to encourage the self-examination of practice), but there is also a more public element to that questioning. At some point, it suggests a communal process of revisiting common values, but in other cases, the questioning is directed to the critique of certain aspects of educational reform and the impact of some of that reform on perceived needs of the school and the children therein.

A theme in the headteachers' replies to interview questions pertaining to advice to new heads also illustrated this reflective orientation. It was worded in two cases as stopping to consider action rather than responding in what they termed a "knee-jerk" fashion. Related to institutional self-confidence, this also implies that their conceptions of leadership include a personal discipline of careful reflection before determining action.

Expanding Influence

In addition, notions of opportunity arise from the data. Armed with an increased sense of institutional self-confidence, these headteachers appear to pursue avenues of influence beyond the boundaries of their school. Whether this is simply a matter of more experience or a more complex understanding of leadership, it is not entirely clear. The data seem to suggest that it is a little of both.

Sensemaking Apparatus and Opportunities for Agency

As noted in the theoretical development of this paper, an aspect of critical conceptions of leadership appears to be the manner in which headteachers make sense of their complex social work contexts. As I noted earlier, the complexity of this metasensemaking includes being able to articulate the links between policy, theories of action, practice, a fluid societal environment for schools (e.g., shifting socioeconomic conditions, family structures), and linking a deep understanding of teaching and learning to each of the above. This is an important and interesting theme arising from these data. It appears that these headteachers, through complex understandings of leadership, are using their leadership constructs to remain anchored to core beliefs. In addition, their critique of policy seems to arise from leadership conceptualizations which further enable them to ride out the turbulent policy environment. All this while managing to walk the line between simultaneously maintaining a dominant presence in the school yet empowering others.

One metaphor used by Headteacher B was that of "swimming across the tide." The context of this metaphor surrounded the tension that headteachers experience as agents and ameliorators of change. Institutional growth appears contingent on change, yet the heads also act as interpretive lenses to change, deflecting those aspects perceived as hostile, and aligning external initiatives to the needs and values of the organization. This is a complex process and one that appears to be beyond the capacity of transformational conceptions of leadership to explain.

The next stages of educational leadership development require post-holders to clearly understand when they are, and when they need to be "managerial." Simultaneously, educational leaders may well need to draw upon their complex understandings of moral leadership imperatives to empower others. We don't have a good picture of the interaction between the development of leadership competence (through more experience) and emerging deeper and

more complex understandings of leadership as a construct. This study aims to contribute to that understanding.

In theory development, we have to come to a greater awareness of what critical leadership means for practice. Issues of domination have a number of representations: personal, interpersonal, and institutional. The contradictory nature of some educational reform policy which consolidates power in the person of the headteacher or principal implores those of us concerned with school leadership (both in theory development and practitioner preparation and support) to broaden our examination of this contradiction in the lived experience of practitioners.

The theme of the UCEA convention, "Contradictions in Accountability" are evident in the data of this study. As the study findings suggest, managerialism may be the "flood tide," but subtle manifestations of transformational and critical leadership are finding their way into the discourse and practice of these headteachers. This suggests that the outcome of contradiction found in accountability and market-based reform may present a unique opportunity for school leaders to exercise their voice in countering the worst of the reforms.

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[i] The education reform cited in this study encompasses England and Wales. Scotland and Northern Ireland retain separate policy oversight of their schools. When the term "British" or "UK" is used in this paper it is assumed to limit comment to England and Wales rather than all of Great Britain.

[ii] All schools in England and Wales are subject to a comprehensive inspection of their school by a team of trained inspectors from the Office for Standards in Education (Ofsted). These inspections are rigorous examinations and evaluations of all aspects of the school's program, teaching quality, leadership, facilities, and community perceptions. The results of these inspection are public record and summaries often appear in local press. As a result, schools that are deemed as weak or failing are required to establish an action plan for remediating the deficiencies, which, if not alleviated, could result in reconstitution of the school.

[iii] 43% rate of refusal

[iv] I view the personal construct data obtained from the repertory grid to be secondary and supportive to the primary data collected through the case studies. I recognized that it would be quite easy for the elegance of repertory grid data to overwhelm the boundaries of its effective use in this study. To that end, the repertory grid data were collected at the end of the case studies. Within the original study, the repertory grid data served as a means of clarifying and illuminating conclusions reached from interviews, observations, and documentary analysis.

[v] The Literacy Hour is a school reform initiative of the current Labour government. The intent of the initiative is to provide a consistent provision for the pedagogy and content of literacy in the country. Schools are not

required to adopt the Literacy Hour provisions, but must be able to explain their reason for opting-out to school inspectors.

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